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COFFEE
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WORLD COFFEE PRODUCTION

JAN 27 1971

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Summary

A number of relatively minor adjustments in the production estimates for several countries resulted in a slight overall increase in the Foreign Agricultural Service's third estimate (December) of the world coffee crop for the 1970-71 crop year from the second estimate, made in September. The total world harvest is now estimated at about 57.4 million bags,^{1/} of which approximately 39.4 million bags are expected to be available for export^{2/} after allowing for estimated consumption in the producing countries.

Some changes have also been made in the 1969-70 coffee estimates, based on recent and more complete information. Total production for 1969-70 is now estimated at 65.8 million bags, with exportable production estimated at about 47.4 million bags.

Most of the decline in coffee production in 1970-71, from the level of the preceding year stems from sharply lower Brazilian production, though the

^{1/} All bags in text are 60 kg. (132.276 lb.)

^{2/} Exportable production is total production less estimated domestic consumption.

COFFEE, GREEN: PRODUCTION IN SPECIFIED COUNTRIES, AVERAGE 1961-62/1965-66, ANNUAL 1966-67/1970-71 ^{1/}

REGION AND COUNTRY	AVERAGE 1961-62/1965-66	1966-67	1967-68	1968-69	1969-70	1970-71
	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}
NORTH AMERICA:						
COSTA RICA.....	1,028	1,215	1,350	1,260	1,400	1,300
CUBA.....	597	450	450	500	500	550
DOMINICAN REPUBLIC.....	630	505	635	540	585	675
EL SALVADOR.....	1,886	1,960	2,400	1,900	2,500	1,900
GUADALUPE.....	8	5	5	5	5	5
GUATEMALA.....	1,814	1,670	1,850	1,740	1,750	1,800
HAITI.....	594	465	500	480	450	420
HONOURAS.....	416	340	480	450	550	550
JAMAICA AND DEP.....	26	18	21	17	20	20
MARTINIQUE.....	6	4	4	4	4	4
MEXICO.....	2,611	2,650	2,900	2,850	3,050	3,200
NICARAGUA.....	487	480	550	540	565	600
PANAMA.....	77	84	86	75	88	80
TRINIDAD-TOBAGO.....	58	54	72	65	43	75
US-HAWAII.....	55	48	39	36	30	35
US-PUERTO RICO.....	263	220	325	280	300	300
TOTAL.....	10,556	10,168	11,667	10,742	11,840	11,514
SOUTH AMERICA:						
BOLIVIA.....	62	70	150	160	165	165
BRAZIL.....	27,580	20,000	23,000	16,500	19,000	9,750
COLOMBIA.....	7,860	7,600	8,000	7,900	8,450	8,500
ECUADOR ^{3/}	808	975	1,175	1,000	660	1,100
GUYANA.....	9	19	19	20	20	20
PARAGUAY.....	54	25	40	65	50	25
PERU.....	802	875	880	860	940	950
SURINAM.....	12	7	7	7	7	7
VENEZUELA.....	814	725	700	750	750	800
TOTAL.....	38,000	30,296	33,971	27,262	30,042	21,317
AFRICA:						
ANGOLA.....	2,919	3,300	3,400	3,100	3,400	3,300
BURUNDI.....	204	240	315	275	240	330
CAMEROON.....	906	1,000	1,100	1,100	1,230	1,200
CAPE VERDE ISLANDS.....	2	2	2	2	2	2
CENT AFRICAN REP.....	156	140	175	160	150	150
COMORO ISLANDS.....	3	3	3	3	3	3
CONGO-BRAZZAVILLE.....	13	15	10	20	15	15
CONGO-KINSHASA.....	1,005	900	1,000	1,000	1,100	1,150
DAHOMEY.....	32	20	15	18	15	15
ETHIOPIA.....	1,539	1,750	1,750	2,045	2,000	2,300
GABON.....	18	15	15	20	20	20
GHANA.....	49	77	94	83	100	90
GUINEA.....	187	120	170	180	250	275
IVORY COAST.....	3,457	2,200	4,500	3,400	4,600	4,000
KENYA.....	687	935	650	800	900	875
LIBERIA.....	50	67	58	65	75	95
MALAGASY REPUBLIC.....	902	865	1,100	900	830	900
NIGERIA.....	31	34	51	53	50	65
RWANDA.....	156	155	190	200	145	225
SAO TOME-PRINCIPE.....	7	6	6	6	5	5
SIERRA LEONE.....	86	65	80	95	75	105
SPANISH AFRICA NEC.....	123	130	145	125	120	120
TANZANIA.....	535	990	740	950	800	900
TOGO.....	201	90	175	280	250	250
UGANDA.....	2,568	2,450	2,700	3,335	2,700	2,900
TOTAL.....	15,834	15,569	18,444	18,215	19,045	19,290
ASIA:						
INDIA.....	1,055	1,395	1,050	1,300	1,150	1,300
INDONESIA.....	2,016	1,850	2,150	2,000	2,200	2,350
MALAYSIA.....	101	135	135	135	100	100
PHILIPPINES.....	667	740	700	735	785	800
PORTUGUESE TIMOR.....	36	45	48	55	50	55
VIETNAM SOUTH.....	59	55	55	55	50	50
YEMEN.....	83	60	60	70	60	60
TOTAL.....	4,017	4,280	4,198	4,350	4,395	4,715
OCEANIA:						
NEW CALEDONIA.....	35	35	35	30	30	30
NEW GUINEA.....	87	225	243	355	425	490
NEW HEBRIDES.....	4	4	4	4	3	3
TOTAL.....	126	264	282	389	458	523
TOTAL WORLD.....	68,534	60,577	68,562	60,958	65,780	57,359

^{1/} Coffee marketing year begins about July in some countries and in others about October. ^{2/} Of 60 kilograms each. ^{3/} As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1970 in that country is shown as production for the 1970-71 marketing year. In Ecuador, however, this is referred to as the 1969-70 crop.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U. S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

COFFEE, GREEN EXPT: PRODUCTION IN SPECIFIED COUNTRIES, AVERAGE 1961-62/1965-66, ANNUAL 1966-67/1970-71 ^{1/}

REGION AND COUNTRY	AVERAGE					
	1961-62/1965-66	1966-67	1967-68	1968-69	1969-70	1970-71
	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}	1,000 BAGS ^{2/}
NORTH AMERICA:						
COSTA RICA.....	906	1,080	1,210	1,115	1,250	1,145
CUBA.....	50	---	---	---	---	---
DOMINICAN REPUBLIC.....	477	340	465	365	400	485
EL SALVADOR.....	1,770	1,825	2,260	1,755	2,350	1,745
GUADELOUPE.....	3	(3)	(3)	(3)	(3)	(3)
GUATEMALA.....	1,607	1,450	1,625	1,505	1,510	1,555
HAITI.....	421	290	320	295	265	230
HONDURAS.....	338	250	390	350	445	440
JAMAICA AND OEP.....	13	6	9	4	5	5
MARTINIQUE.....	---	---	---	---	---	---
MEXICO.....	1,591	1,350	1,500	1,400	1,550	1,650
NICARAGUA.....	439	420	490	495	495	525
PANAMA.....	24	24	24	11	24	14
TRINIDAD-TOBAGO.....	50	42	59	51	33	63
US-HAWAII.....	13	10	10	26	---	---
US-PUERTO RICO.....	42	14	---	---	---	---
TOTAL.....	7,743	7,101	8,362	7,372	8,327	7,857
SOUTH AMERICA:						
BOLIVIA.....	23	35	50	55	55	50
BRAZIL.....	20,480	12,000	14,745	8,000	10,250	1,750
COLOMBIA.....	6,800	6,350	6,700	6,570	7,080	7,090
ECUADOR ^{4/}	624	780	975	795	450	885
GUYANA.....	3	1	1	2	2	2
PARAGUAY.....	44	15	29	40	25	---
PERU.....	627	675	670	645	720	725
SURINAM.....	7	2	2	3	3	3
VENEZUELA.....	321	175	130	160	160	190
TOTAL.....	28,929	20,033	23,302	16,270	18,745	10,695
AFRICA:						
ANGOLA.....	2,864	3,240	3,340	3,040	3,300	3,200
BURUNDI.....	190	235	310	270	235	325
CAPEVERDE ISLANDS.....	882	970	1,070	1,070	1,170	1,170
CAPE VERDE ISLANDS.....	2	2	2	2	1	1
CENT AFRICAN REP.....	151	135	170	155	145	145
COMORO ISLANDS.....	1	1	1	1	1	1
CONGO-BRAZZAVILLE.....	16	14	9	19	14	14
CONGO-KINSHASA.....	955	850	950	950	1,025	1,075
DAHOMEY.....	29	18	13	16	13	13
ETHIOPIA.....	1,194	1,385	1,280	1,420	1,375	1,650
GABON.....	16	13	13	18	18	18
GHANA.....	38	75	92	70	86	76
GUINEA.....	172	105	155	175	240	265
IVORY COAST.....	3,465	2,145	4,445	3,350	4,535	3,925
KENYA.....	667	915	630	780	880	855
LIBERIA.....	48	65	56	63	70	90
MALAGASY REPUBLIC.....	802	760	990	785	710	775
NIGERIA.....	34	32	49	43	30	45
RWANDA.....	148	150	180	190	135	215
SAO TOME-PRINCIPE.....	5	5	5	3	3	3
SIERRA LEONE.....	76	55	70	85	70	100
SPANISH AFRICA NEC.....	113	120	135	115	110	110
TANZANIA.....	521	975	725	935	785	885
TOGO.....	197	85	170	275	245	245
UGANDA.....	2,555	2,435	2,685	3,320	2,685	2,885
TOTAL.....	15,083	14,785	17,645	17,150	17,881	18,086
ASIA:						
INDIA.....	445	700	350	560	410	550
INDONESIA.....	1,726	1,490	1,650	1,500	1,500	1,650
MALAYSIA.....	---	---	---	---	---	---
PHILIPPINES.....	---	---	---	---	---	---
PORTUGUESE TIMOR.....	30	40	43	50	45	50
VIETNAM SOUTH.....	8	(3)	(3)	(3)	(3)	(3)
YEMEN.....	75	50	50	60	50	50
TOTAL.....	2,285	2,280	2,093	2,170	2,005	2,300
OCEANIA:						
NEW CALEDONIA.....	30	30	30	20	20	20
NEW GUINEA.....	72	210	240	315	421	486
NEW HEBRIDES.....	4	4	4	3	2	2
TOTAL.....	106	244	274	338	443	508
TOTAL WORLD.....	54,145	44,443	51,676	43,300	47,401	39,446

^{1/} Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. ^{2/} Of 60 kilograms each. ^{3/} Negligible. ^{4/} As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1970 in that country is shown as production for the 1970-71 marketing year. In Ecuador, however, this is referred to as the 1969-70 crop.

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North American countries also have a slightly lower aggregate production this year. Slightly increased production is anticipated in Africa, Asia, and Oceania.

In response to price changes, a number of quota adjustments under the International Coffee Agreement were made during the quarter, affecting all four main types of coffee. The initial overall quota of 54 million bags, approved last August by the International Coffee Council, was increased to 57.1 million bags as of the end of November, but subsequently was reduced to 54.6 million bags at the end of December.

Production

North America--In the aggregate, coffee production in North America is expected to decline by about 326,000 bags (2.8 percent) in 1970-71 from the level of the preceding year.

The major change this year is the sharp decline of production in El Salvador following last year's record-breaking harvest. Although estimated production of 1.9 million bags is 600,000 bags less than the 1969-70 crop, average quality should be up this year due to a higher proportion of "high grown," compared with "central standard," grades.

Production in Mexico is expected to be up about 5 percent in 1970-71. Heavy frosts in the State of Veracruz in November, however, may have some effect on both quality and quantity of the harvest.

Costa Rica will have another good crop in 1970-71, though it will be down about 100,000 bags from last year's alltime record of 1.4 million bags.

Moderately higher production is also anticipated in the Dominican Republic, Nicaragua, and Guatemala, while slight declines are expected in Haiti and Panama.

South America--Total estimated production in South America during the 1970-71 crop year is expected to decline 29.1 percent from the level of the previous year, due almost entirely to the extremely short crop in Brazil. As reported previously, the severe drop in Brazilian production was the result of a frost in the State of Paraná and concurrent drought in the State of São Paulo. The third estimate of Brazilian production, based on more recent information, is 2.5 percent below the September estimate.

Production in the other South American countries is generally up this year compared with the 1969-70 level. Ecuador anticipates a harvest of 1.1 million bags, and neighboring Peru expects a record 950,000 bags.

More complete and updated information indicates that 1969-70 coffee production in Colombia was higher than estimated earlier and was the largest on record. The sharp increase over the preceding year has been attributed to uniformly good weather in most coffee growing zones and to improved cultural practices, mainly greater use of fertilizers. Because of widespread and increased use of fertilizers, owing to higher coffee prices, estimates for the 1970-71 crop have also been raised. It is now estimated that 1969-70 production amounted to 8,450,000 bags and that the 1970-71 harvest will be slightly larger, at 8,500,000 bags.

Africa-- Overall African coffee production in 1970-71 is expected to be about the same as in the preceding year, though there are significant changes in a number of countries.

In the Ivory Coast, 1970-71 production is expected to be no more than 4 million bags, a drop of 13 percent from the very large 1969-70 crop. The decline is attributed to unfavorable weather conditions and the fact that 1970-71 is an off year in the production cycle.

Production in Angola, the continent's second largest producer, is also expected to be down slightly to about 3.3 million bags. In contrast, production is anticipated to be about 15 percent higher in Ethiopia and 12 percent higher in Tanzania.

The 1970-71 crop will also be somewhat larger in Uganda, Burundi, Rwanda, the Malagasy Republic, and the Congo (Kinshasa). A slightly smaller crop is expected in Kenya.

Based on the latest information, production in the relatively minor producing countries shows some changes, with Guinea, Liberia, Sierra Leone, and Nigeria expecting larger crops and Ghana decreased production.

Asia and Oceania--It is anticipated that total production of coffee in the countries in this area will be up about 7.9 percent in 1970-71 from the level of the preceding year.

On the basis of current information, it appears that India will have a very large crop, second only to the record crop harvested in 1966-67 and up about 13 percent from the level of last year. Final data now indicate 1969-70 production at about 1,150,000 bags.

Preliminary data indicate that production in Indonesia will be up about 5 percent, to an estimated 2,350,000 bags.

The estimate for Papua and New Guinea remains at nearly 500,000 bags for 1970-71, though the estimate for 1969-70 has been reduced about 5 percent on the basis of recent information.

Other Developments

Prices--Although prices of green coffee were at a relatively high level for recent years at the start of the 1970-71 coffee year on October 1, 1970, they trended downward throughout the quarter. All four main types of coffee lost ground during the period, with Other Milds hardest hit.

Between October 1 and December 31, 1970, Colombian Milds dropped from 56.25 cents per pound to 52.13; Other Milds, from 52.25 cents to 45.30; Unwashed Arabicas, from 59.25 cents to 56.50; and Robustas, from 43.25 cents to 41.75.

One consequence of these falling prices for green coffee was a reduction of 4 cents a pound in the wholesale price of roasted coffee in the United States, effective for most companies in late November.

Quota Actions--An unusually large number of quota changes occurred during the final quarter of 1970 in accordance with the terms of the quota regulatory mechanisms approved at the August meeting of the International Coffee Council

Demand appeared to be light in importing countries, and price movements were erratic. Under the selectivity system countries producing certain types of coffee were receiving increases in their export quotas at the same time that other countries saw their quotas reduced.

The initial overall export quota of 54 million bags was increased to 56 million in October, inasmuch as the composite price had remained above 52 cents per pound for the prescribed period. Also in October, countries producing Unwashed Arabicas and Robustas received increases under the selectivity system amounting to 542,162 and 328,320 bags, respectively. In November, countries producing Unwashed Arabicas received a second selectivity increase of 542,165 bags while, at the same time, producers of Other Milds had their quotas reduced by 2.5 percent, or 273,823 bags. In December producers of Colombian Milds and Other Milds had their quotas cut by 205,692 and 273,823 bags, respectively, since indicator prices for these types remained below the floor for the required number of days. Additionally, since the composite price had remained under 50 cents per pound for the required period, the 2-million-bag pro-rata increase granted all countries in October was withdrawn.

As a result of all of these actions, the original 54-million-bag quota grew to 56.8 million bags at the end of October and 57.1 million bags at the end of November; but it declined to 54.6 million bags as of the end of December.

Coffee: Export value as percent of total exports, 1965-69

Continent and country	1965	1966	1967	1968	1969
	Percent	Percent	Percent	Percent	Percent
North America:					
Costa Rica.....	41.7	38.8	39.8	31.4	27.0
Dominican Republic.....	16.8	15.4	10.8	10.9	11.5
El Salvador.....	50.7	47.1	46.8	43.5	43.1
Guatemala.....	49.4	44.3	34.5	33.0	31.9
Haiti.....	55.6	51.2	37.2	38.9	44.0
Honduras.....	17.6	13.8	11.6	11.7	8.6
Mexico.....	5.7	6.1	4.7	6.3	5.0
Nicaragua.....	17.7	15.3	13.9	14.0	13.0
South America:					
Brazil.....	44.3	43.9	42.6	41.2	35.2
Colombia.....	63.8	64.7	63.2	62.9	56.6
Ecuador.....	21.2	17.2	19.9	17.9	14.6
Peru.....	4.3	3.7	3.9	4.1	3.6
Venezuela.....	.5	.5	.5	.3	.5
Africa:					
Angola.....	46.8	48.1	51.9	45.3	35.7
Congo, Kinshasa.....	26.7	32.4	57.5	1/	1/
Cameroon.....	22.3	29.4	31.9	27.0	20.2
Ethiopia.....	65.0	57.7	55.2	59.3	59.6
Ivory Coast.....	37.8	39.4	31.7	34.2	25.5
Kenya.....	29.9	32.2	29.3	22.2	26.6
Malagasy Republic.....	31.5	31.5	31.6	30.8	28.4
Tanzania.....	13.7	19.1	15.4	16.7	15.4
Uganda.....	48.5	52.8	53.5	54.6	55.8
Asia and Oceania:					
India.....	1.6	1.4	1.0	1.4	1.5
Indonesia.....	4.5	4.8	6.6	6.2	6.4

1/ Not available.

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GREEN COFFEE: Exports from specified countries, by country of destination, calendar year 1969

Country of destination	Angola	Brazil	Colombia	Guatemala	Ivory Coast	Mexico
	Bags 1/	Bags 1/	Bags 1/	Bags 1/	Bags 1/	Bags 1/
Europe:						
Austria.....	---	4,371	117	467	---	---
Belgium-Luxembourg.....	35,683	432,432	152,965	42,783	6,217	5,753
Bulgaria.....	---	23,241	4,667	---	---	---
Czechoslovakia.....	---	150,233	35,519	400	---	---
Denmark.....	4,500	714,372	69,366	5,800	---	2,048
Finland.....	10,517	415,750	272,529	34,817	---	583
France.....	15,117	902,568	72,152	15,517	1,189,750	1,840
Germany, East.....	---	301,940	144,629	---	---	---
Germany, West.....	26,950	775,864	1,316,660	263,233	53,067	80,958
Greece.....	---	195,488	4,315	---	5,033	---
Hungary.....	---	136,568	15,832	2,433	37,700	---
Iceland.....	---	34,823	---	---	---	---
Italy.....	1,333	2,219,602	52,638	19,067	87,050	1,147
Netherlands.....	661,633	652,312	389,541	85,667	13,183	10,672
Norway.....	4,867	468,692	42,018	11,583	50	353
Poland.....	39,533	150,929	115,444	11,867	52,083	---
Portugal.....	304,066	59	---	---	---	---
Rumania.....	---	19,166	0	10,167	---	---
Spain.....	147,867	283,608	375,559	417	---	53,038
Sweden.....	1,500	1,146,426	327,623	21,466	---	---
Switzerland.....	17,250	51,004	27,499	25,283	1,600	90,318
United Kingdom.....	16,850	311,984	53,367	7,683	164,650	2,615
USSR.....	---	166,660	83,335	---	16,800	---
Yugoslavia.....	---	365,884	70,833	---	---	19,385
Others.....	---	292	---	---	---	---
Total.....	1,287,666	9,924,268	3,626,608	558,650	1,627,183	268,710
North America:						
Canada.....	146,183	337,543	80,874	38,317	---	9,395
United States.....	1,276,850	6,027,068	2,551,294	774,783	847,616	1,283,745
Others.....	---	---	1,417	---	4,367	---
Total.....	1,423,033	6,364,611	2,633,585	813,100	851,983	1,293,140
South America.....	---	883,250	101,304	---	---	---
Africa.....	257,834	110,424	2,729	50,683	181,133	---
Asia and Oceania.....	78,733	1,407,031	113,788	78,617	284,583	3,500
Not specified.....	---	---	---	---	26,934	---
Grand total.....	3,047,266	18,689,584	6,478,014	1,501,050	2,971,816	1,565,350

1/ 60 kilograms or 132.276 lb. each.

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